

FINAL GRAPE CRUSH REPORT 2001 CROP

Reissued September 2002

**CALIFORNIA DEPARTMENT OF FOOD AND AGRICULTURE
SACRAMENTO, CALIFORNIA**

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GRAPE CRUSH REPORT OVERVIEW

This Bulletin is a reissue of the 2001 Grape Crush Report published earlier in March 2002. The Report presents final 2001 grape crush statistics and it includes revisions made since the March report. The reissue was required to include late reports and address a number of processing and reporting errors which affected results for some district/variety numbers. Many of the data corrections, additional and late reported data were a result of the new Pierce's Disease Assessment program which was implemented this year for the first time.

Details of the crushed tonnage, degrees Brix, and weighted average prices were reported by grape type and variety, as well as by grape pricing districts. The 17 districts refer to the area in which the grapes were grown as defined in the Administrative Code. A district map is located on the inside of the front cover. Beginning with the 2000 crop year, Valdepenas variety grapes were combined with Tempranillo variety grapes, and Muscadelle variety grapes were combined with Sauvignon Vert variety grapes. In 2001, Pinot St. George variety grapes were combined with Negrette, Syrah Noir with Syrah, and Touriga with Touriga Nacional.

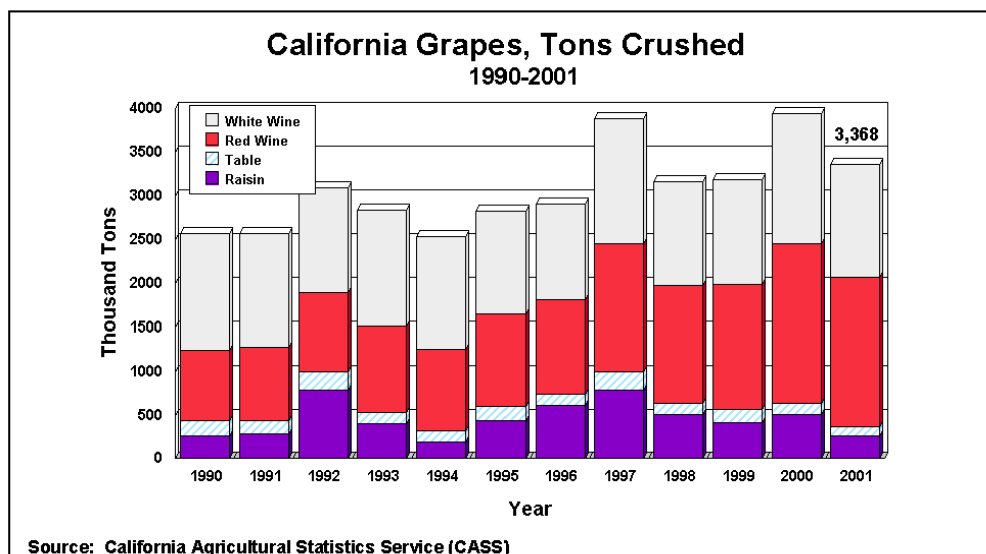
Information contained in this Report was supplied by processors to fulfill the reporting requirements of Section 55601.5 of the Food and Agricultural Code.

SUMMARY OF GRAPE TONNAGES AND PRICES

The 2001 crush totaled 3,368,265 tons, down 15 percent from the record 2000 crush of 3,951,185 tons. Red wine varieties accounted for the largest share of all grapes crushed, at 1,706,037 tons, down 6 percent from 2000. The 2001 white wine variety crush totaled 1,299,921 tons, down 13 percent from 2000. Tons crushed of raisin type varieties totaled 261,719, down 49 percent from 2000, while tons crushed of table type varieties totaled 100,589 down 16 percent from 2000. (See chart below.)

Beginning with the 1999 season, the Grape Crush Report includes the total number of tons crushed that will be marketed as grape concentrate. In determining grape tonnage crushed for concentrate production, each processor was required to report the estimated equivalent tons of grapes crushed that are expected to be marketed as grape concentrate. For the 2001 season, this total was 536,614 tons, approximately 16 percent of the 2001 grape crush total. This report provides only the aggregate figure for grapes crushed for concentrate production and does not include information by district, type, or variety.

California grape growers received prices in 2001 for raisin, table, and white wine grapes that were, on average, less than the 2000 prices, while the prices received for red were, on average, above the 2000 prices. The 2001 average price of all varieties was \$554.73, up 10 percent from 2000. Average prices for the 2001 crop by type were as follows: red wine grapes, \$680.45, up 8 percent from 2000; white wine grapes, \$491.28, down 2 percent from 2000; raisin grapes, \$85.65, down 32 percent; and table grapes, \$87.16, down 26 percent. These price levels have not been adjusted for inflation.



CALIFORNIA GRAPE CRUSH TONNAGE AND PRICE, 1988-01

Crop Year	Raisin Type		Table Type		Red Wine Type		White Wine Type		All Types	
	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton
1988	415	116	312	131	760	409	1,356	238	2,843	253
1989	370	132	211	128	872	410	1,272	297	2,725	297
1990	268	126	170	127	804	355	1,331	277	2,573	276
1991	284	150	157	141	840	383	1,289	319	2,570	310
1992	785	182	217	170	888	438	1,209	364	3,099	325
1993	452	152	137	147	979	430	1,327	316	2,895	323
1994	239	118	123	136	936	462	1,242	317	2,540	344
1995	432	164	170	162	1,052	515	1,175	351	2,829	372
1996	618	191	117	188	1,079	611	1,094	469	2,908	452
1997	786	185	212	169	1,461	656	1,433	546	3,891	497
1998	506	164	135	150	1,333	643	1,194	521	3,169	502
1999	419	200	149	187	1,422	649	1,195	518	3,185	525
2000	513	125	120	118	1,816	628	1,503	500	3,951	504
2001	262	86	101	87	1,706	680	1,300	491	3,368	555

Source: California Agricultural Statistics Service (CASS)

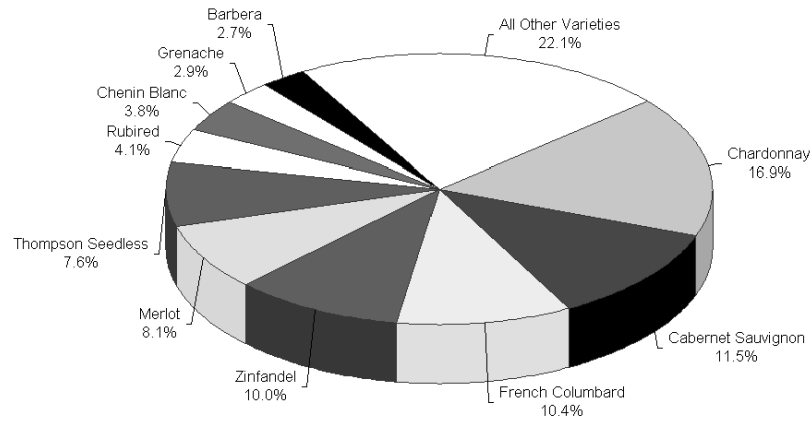
LEADING GRAPE VARIETIES AND DISTRICTS

In 2001, Chardonnay accounted for the largest percentage of crush volume with 17 percent. Cabernet Sauvignon accounted for the second leading percentage of crush with 11 percent of the total crush. The next eight highest percentages of grapes crushed, with the exception of Thompson Seedless, were all wine varieties.

Grapes produced in District 4 (Napa County) received the highest average price of \$2,827.06 per ton, up 15 percent from 2000. District 3 (Sonoma and Marin counties) received the second highest return of \$2,158.97, up 6 percent from 2000. Of the grapes grown Statewide, Negrette received the highest average price of \$2,142.58 ^{1/} per ton followed by Vernaccia with \$2,033.32 ^{1/} per ton. Marechal Foch, Blaufrankisch, and De Chaunac rounded out the top five highest average prices with \$2,000.00 ^{1/} per ton each. The 2001 Chardonnay price of \$845.83 was down 6 percent from 2000, while the 2001 Cabernet Sauvignon price of \$1,068.82 was up 2 percent from 2000. The 2001 average price for Merlot and Zinfandel grapes increased to \$1,006.65 and \$526.55, up 6 percent and 13 percent from 2000, respectively.

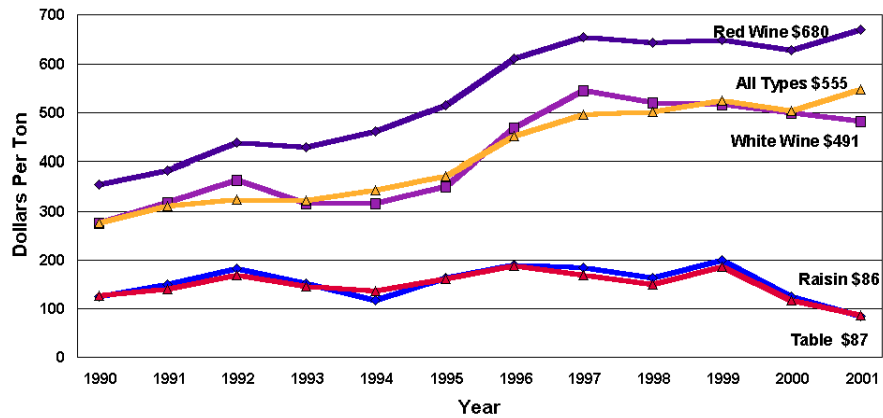
^{1/} These purchases involved less than 50 tons.

Leading Varieties Crushed Percent of Total Crush 2001 Crop



Source: California Agricultural Statistics Service (CASS)

Grape Crush, Dollars Per Ton By Type, 1990-2001



Source: California Agricultural Statistics Service (CASS)

EXPLANATION OF TABLES

TABLE 1 is a summary of the 2001 crop State totals by grape type and varieties that are shown in detail by grape pricing districts in Tables 2 through 6. State totals and averages for 2000 are shown for comparison.

TABLE 2 includes over-the-scale fresh tonnage of all grapes crushed by California processors from the 2001 crop. Over-the-scale fresh weight tonnage includes materials other than grapes (MOG) and defects. This table is broken down by the 17 grape pricing districts and by variety. State totals for 2000 are shown for comparison. Crushed tonnage includes all grapes crushed whether: grown and crushed by processors; purchased and crushed by processors; crushed by cooperatives, juice manufacturers, etc.; or crushed for others, including growers.

TABLE 3 shows the weighted average degrees Brix for all grapes crushed (TABLE 2) by California processors from the 2001 crop. The weighted average degrees Brix is reported by grape pricing districts and variety. State averages for 2000 are shown for comparison.

TABLE 4 includes net weight fresh tonnage of all grapes purchased for wine, concentrate, juice, vinegar, and beverage brandy by California processors from the 2001 crop. Net weight fresh tonnage does not include material other than grapes (MOG) and defects or other weight adjustments deducted from gross weight. The purchased tonnage is reported by variety and grape pricing districts. State totals for 2000 are shown for comparison. TABLE 4 does not include tonnage purchased as distilling material other than beverage brandy, this is shown in TABLE 7. Prices for all tonnage shown in this table are final and not subject to change. Grapes pooled by cooperatives, those grown by processors and used for their own production and grapes crushed to growers' accounts are not included.

TABLE 5 shows the weighted average degrees Brix for all grapes purchased for wine, concentrate, juice, vinegar, and beverage brandy (TABLE 4) by California processors from the 2001 crop. The weighted average degrees Brix is reported by grape pricing districts and variety. State averages for 2000 are shown for comparison. TABLE 5 does not include degrees Brix of tonnage purchased as distilling material other than beverage brandy, this is shown in TABLE 7. Grapes pooled by cooperatives, those grown by processors and used for their own production and grapes crushed to growers' accounts are not included.

TABLE 6 gives the weighted average price per ton, delivered basis, of all tonnage purchased for wine, concentrate, juice, vinegar, and beverage brandy (TABLE 4) by California processors from the 2001 crop. The weighted average prices are reported by variety, and grape pricing districts. State averages for 2000 are shown for comparison. TABLE 6 does not include prices of tonnage purchased as distilling material other than beverage brandy, this is shown in TABLE 7. Prices shown in this table are final and not subject to change. Grapes pooled by cooperatives, those grown by processors and used for their own production and grapes crushed to growers' accounts are not included.

Weighted average prices reflect final prices through January 10, 2002 and include any Brix adjustments, bonuses or allowances. Prices from some reference price contracts written prior to January 1, 1977 may be included if settled by January 10, 2002. Prices are equivalent to delivered basis in the area grown including normal within-area hauling allowances. Purchases made on a roadside basis include the usual hauling allowance for local delivery in the area grown. Out-of-area purchases made on a delivered basis do not include extra hauling allowances for delivery outside the area.

The following example indicates the method used for calculating weighted averages:

DATA PAGE																				
IDENTIFICATION				SECTION I.			SECTION II.													
				Total Grapes Crushed At Your Facility			Final Prices Of Grapes Purchased From Grower(s) For Wine, Concentrate, Juice, Vinegar And Beverage Brandy													
VARIETY (List full name)	* Dist. Where Grown	Code	Line	Over The Scale Tons	Wtd. Avg. Degrees Brix	Total Brix (Col. 3 X Col. 4)	Purchased Tons Only		Wtd. Avg. Degrees Brix	Total Brix (Col. 5 X Col. 7)	Base Price Per Ton	Acceptable Brix Limits		Brix Adjustment Factors Per Degrees Brix Per Ton Plus & Minus	Office Use	Brix Adjustment Limits			Wtd. Avg. Price Per Ton	Total Paid (Col. 5 x Col. 16)
							All Purchased Tons	Non-Related Purchased Tons				Min.	Max.			Base	Min.	Max.		
		1	2	3	4	A	5	6	7	B	8	9	10	11	12	13	14	15	16	C
Petite Sirah	1			155.5	20.6	3,203.3	100.0	100.0	20.1	2,010.0	450.0	19.0	25.0	+ or - 10%		22.0	20.0	24.0	364.50	36,450.00
Petite Sirah	1			20.5	19.0	389.5	20.5	20.5	19.0	389.50	450.0	19.0	25.0	+ or - 10%		22.0	20.0	24.0	418.50	8,579.25
Petite Sirah	1			10.6	23.5	249.1	10.6	10.6	23.5	249.10	450.0	19.0	25.0	+ or - 10%		22.0	20.0	24.0	517.50	5,485.50
Combined	1			186.6	20.6	3,841.9	131.1	131.1	20.2	2,648.6	450.0	19.0	25.0	+ or - 10%		22.0	20.0	24.0	385.31	50,514.75

Column 4 was obtained by dividing the total Over the Scale Tons (Column 3) into the Total Brix of these same tons (Column A):

$$\frac{3,841.9}{186.6} = 20.6$$

Column 7 was obtained by dividing the Purchased Tons Only (Column 5) into the Total Brix of these same tons (Column B):

$$\frac{2,648.6}{131.1} = 20.2$$

Column 16 was obtained by dividing the total Purchased Tons Only (Column 5) into the total dollars paid for these same tons (Column C):

$$\frac{\$50,514.75}{131.1} = \$385.31$$

TABLE 7 shows all grape tonnage purchased as distilling material other than beverage brandy by California processors from the 2001 crop. The tonnage, weighted average degrees Brix and price per ton are shown by grape type and variety. State totals and averages for 2000 are given for comparison.

TABLE 8 shows base prices paid to growers by Brix adjustment factors, purchased tonnage, type, variety and reporting district where grown. Weighted average base prices and total purchased tonnage are included.

The Brix adjustment factors determine adjustments to base prices to compensate for sugar variations. In this report, adjustments are expressed in dollars per ton, or percent of base price per degree variance from the established Brix base. Occasional lots are traded on price per degree Brix as delivered.

TABLE 9 includes tonnage of all grapes crushed to growers' accounts by California processors from the 2001 crop. Growers retained ownership of these grapes at the time of crushing. This tonnage is reported by grape pricing district and variety. Comparisons with 2000 are shown. *(Table 9 only appears in the Final Grape Crush Report.)*

TABLE 10 gives the weighted average price per ton, delivered basis, of all tonnage purchased from non-related sources for wine, concentrate, juice, vinegar, and beverage brandy (TABLE 4) by California processors from the 2001 crop. The weighted average prices are reported by variety, and grape pricing districts. State averages for 2000 are shown for comparison. TABLE 10 does not include prices of tonnage purchased as distilling material other than beverage brandy, this is shown in TABLE 7. Prices shown in this table are final and not subject to change. Grapes pooled by cooperatives, those grown by processors and used for their own production and grapes crushed to growers' accounts are not included.

Non-Related Purchased Tons: Excludes tonnage of grapes purchased from a grower if:

- (a) The grower or an affiliate of the grower, or both the grower and the affiliate of the grower, owned, directly or indirectly, at least 5 percent of the indicia of ownership or voting authority of the winery (processor);
- (b) The winery (processor) or an affiliate of the winery, or both the winery and the affiliate of the winery, owned, directly or indirectly, at least 5 percent of the indicia of ownership or voting authority of the grower;
- (c) The winery (processor) or an affiliate of the winery, or both the winery and the affiliate of the winery, provided long-term financing to the grower in exchange for rights or options to purchase a significant portion of the grower's harvest.

Synonyms for Grape Variety Names

(First synonym listed was used for this publication.)

Alicante Bouschet -- Alicante	Malvasia Bianca -- Vennentino, Vermintino	Red Globe -- Rose Ito
Black Corinth -- Zante Current	Marechal Foch -- Foch	Refosco -- Mondeuse
Black Prince -- Rose of Peru	Mataro -- Mourvedre	Rubired -- Tintoria
Burger -- Monbadon	Meunier -- Pinot Meunier	Ruby Seedless -- King Ruby
Chardonnay -- Pinot Chardonnay	Muscat Blanc -- Muscat Canelli,	Sangiovetto -- Sangiovese, Brunello
Cinsaut -- Black Malvoisie, Black Malvasia	Muscat Blanc A Petits Grains	Sauvignon Vert -- Muscadelle
Emerald Seedless -- Black Seedless	Muscat Hamburg -- Black Muscat	St. Emillion -- Ugni Blanc, Trebbiano
Flame Seedless -- Red Flame	Negrette -- Pinot St. George	Sugraone -- Superior Seedless Brand
Gamay (Napa) -- Gamay, Valdiguie	Olivette Blanche -- Lady Finger	Syrah -- Syrah Noir, French Syrah, Shiraz
Gray Riesling -- Trousseau Gris	Palomino -- Golden Chasselas	Tempranillo -- Tinta Roriz, Valdepenas
Grenache -- Grenache Noir	Pinot Gris -- Pinot Grigio	Touriga Nacional -- Touriga
Italia -- Muscat Italia	Portugieser Blauer -- Blue Portugues	Trousseau -- Bastardo
Malaga -- White Malaga	Red Crimson -- Crimson Seedless	White Riesling -- Johannisberg Riesling, Riesling